U.S. Office of Personnel Management
U.S. General Services Administration

StrategicSourcing.Gov

HCaTS Industry Pre Solicitation Meeting

May 21, 2015

Agenda

Opening Remarks
- Alexandra Rouse, GSA Project Manager
- Tom Sharpe, Commissioner - Federal Acquisition Service, GSA
- Joseph Kennedy, Associate Director, Human Resource Solutions - OPM

Category Management
- Anne Rung, Administrator, Office of Federal Procurement Policy - OMB

Procurement Process
- Tiffany Hixson, Head of Contracting Activity - Federal Acquisition Service, GSA

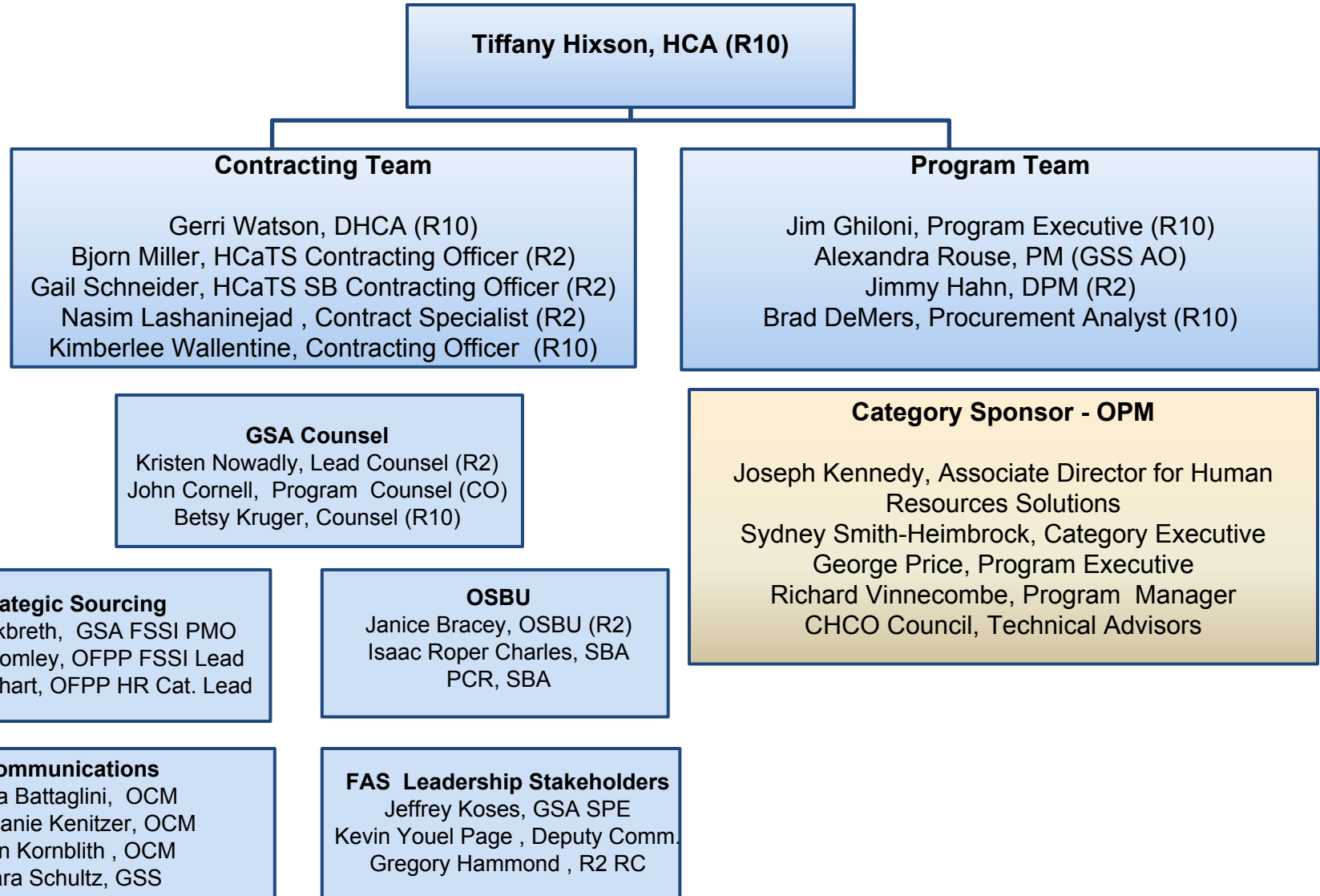## Acquisition Overview and Scope
- Bjorn Miller, HCaTS Contracting Officer - Federal Acquisition Service, GSA
- Gail Schneider, HCaTS SB Contracting Officer - Federal Acquisition Service, GSA

Closing Remarks
- Katherine Archuleta, Director - OPM

The Acquisition Team

Tiffany Hixson, HCA (R10)

Contracting Team

Gerri Watson, DHCA (R10)
Bjorn Miller, HCaTS Contracting Officer (R2)
Gail Schneider, HCaTS SB Contracting Officer (R2)
Nasim Lashaninejad , Contract Specialist (R2)
Kimberlee Wallentine, Contracting Officer (R10)

Program Team

Jim Ghiloni, Program Executive (R10)
Alexandra Rouse, PM (GSS AO)
Jimmy Hahn, DPM (R2)
Brad DeMers, Procurement Analyst (R10)

GSA Counsel
Kristen Nowadly, Lead Counsel (R2)
John Cornell, Program Counsel (CO)
Betsy Kruger, Counsel (R10)

Category Sponsor - OPM

Joseph Kennedy, Associate Director for Human Resources Solutions
Sydney Smith-Heimbrock, Category Executive
George Price, Program Executive
Richard Vinnecombe, Program Manager
CHCO Council, Technical Advisors

Strategic Sourcing
Walter Eckbreth, GSA FSSI PMO
Meredith Romley, OFPP FSSI Lead
Joanie Newhart, OFPP HR Cat. Lead

OSBU
Janice Bracey, OSBU (R2)
Isaac Roper Charles, SBA
PCR, SBA

Communications
Cara Battaglini, OCM
Stephanie Kenitzer, OCM
Joan Kornblith , OCM
Sara Schultz, GSS

FAS Leadership Stakeholders
Jeffrey Koses, GSA SPE
Kevin Youel Page , Deputy Comm.
Gregory Hammond , R2 RC

Strategy of HCaTS

- Chartered by Category Management Leadership Council

- Government-wide Multiple Award, Indefinite Delivery, Indefinite Quantity

- Provides Federal agencies' training & development, human capital and organizational performance services

- Allows for full range of pricing types

- Will serve as a knowledge management repository for contract services in this category

Goals of HCaTS

- Provide flexible and customizable total solution at individual, unit and/or enterprise level

- Maximize use of small businesses and provide avenues for potential growth

- Provide transactional data, best practices, and lessons-learned to Government

- Provide value added services in training, developing solicitations, and scope reviews to reduce high risk contracting

- Offer on-ramping mechanism to refresh contract pool, maximizing competition at the task order level

Industry Feedback Summary from the Draft RFP

What we heard:

- Over 600 questions received from over 60 different Industry identities
- Recurring themes:
  - NAICS Codes
  - Experience as a Subcontractor
  - Accreditations
  - Past performance
  - Collection of task orders

- Top question topics breakdown by frequency:
  - 14% relevant experience
  - 10% key contractor personnel
  - 10% accreditations
  - 10% general questions
  - 7% scoring
  - 7% NAICS Codes

Updates to the HCaTS RFP

Scope	DRFP Evaluation Criteria	Change	Anticipated Effect
1. NAICS assigned to past performance project	At least 4 NAICS per pool had to be represented in Relevant Experience Projects. 2 other Relevant Experience Projects can have any NAICS. Points associated with representing multiple NAICS.	NAICS scoring elements removed. Scoring for Relevant Experience Projects is focused on KSAs and past performance.	Aligns with our messaging that the scope of HCaTS is defined by the KSAs and not the NAICS, and provides more opportunity to industry partners.
2. Subcontractor experience for a Relevant Experience Project	Work as a subcontractor was not allowable.	Subcontractor experience as a First-Tier provider will be permitted. Points will be given for both Federal experience as a Prime contractors and First-Tier subcontractor, with the points weighted higher for Prime contractors.	Increased competition, especially for small businesses, under HCaTS SB.
3.Accreditations	Accreditations tied to Key Personnel and a company	Accreditations will be linked to a company only	Reduce volatility with an accreditation tied to a single person (job changes, etc).

Updates to the HCaTS RFP

Scope	DRFP Evaluation Criteria	Change	Anticipated Effect
4. Collection of Task Orders	Collection of task orders not accepted as a Relevant Experience Project	Allowance of one Relevant Experience Project per pool to be made up of a collection of up to six (6) related task orders.	Allow industry partners who have been awarded multiple task orders for the same project to use that project as a Relevant Experience Project
5. Point Allocation	Points distributed for a variety of factors	Significant increase in points for experience and past performance	Ensuring awardees are strong HR service providers
6. DCAA Audits	DCAA audits required for all Offerors prior to award and all HCaTS contractors are eligible to provide cost reimbursable work.	Accounting system reviews are optional. Only Offerors with adequate accounting systems will be eligible for cost-reimbursable work at the Task Order Level.	Contractors can opt in to participate in cost-reimbursable work if they have an adequate cost accounting system.

HCaTS Acquisition Overview and Scope

The Government contemplates awarding separate Government-wide, Multiple Award, Indefinite Delivery, Indefinite Quantity task order contracts resulting from two RFPs:

- Highest Technically Rated with Fair and Reasonable Prices (HTRFRP)
    - Neither Lowest Price Technically rated nor Best Value - Trade-off
    - Modeled after OASIS acquisition

- HCaTS and HCaTS SB Structure
    - Two MA-IDIQ task order contracts
    - 40 awards per Pool
    - In the event of a tie at the 40th position, all tying Offerors will receive award
    - Plan to award without discussion
    - Initial proposals shall contain the best offer

- Benefits
    - Industry doesn't have to write lengthy narratives
    - Industry won't have to propose limiting labor rates
    - Industry gets to choose which projects to submit, inclusive of Federal and non-Federal projects
    - Objective rather than subjective evaluations

Pool Structure & NAICS Codes Groups

HCaTS	HCaTS SB
Pool 1 ● Predominant NAICS: 611430- Professional & Management Development Training ● Size Standard $11M ● *Maximum Number of Awards 40*	**Pool 1** ● Predominant NAICS: 611430- Professional & Management Development Training ● Size Standard $11M ● *Maximum Number of Awards 40*
Relevant NAICS to Pool 1: 611699, 624310	**Relevant NAICS to Pool 1: 611699, 624310**
Pool 2 ● Predominant NAICS: 541612- Human Resource Consulting Service ● Size Standard $15M ● *Maximum Number of Awards 40*	**Pool 2** ● Predominant NAICS: 541612- Human Resource Consulting Service ● Size Standard $15M ● *Maximum Number of Awards 40*
Relevant NAICS to Pool 2: 541611, 541613, 541618, 611710	**Relevant NAICS to Pool 2: 541611, 541613, 541618, 611710**

3 Key Service Areas (KSAs) - Description/ Specification

Customized Training and Development Services (KSA1)
- Customized Training Services
- Customized Employee Development Services

Customized Human Capital Strategy Services (KSA2)
- HR Strategy
- Organizational and Position Management
- Performance Management
- Compensation Management (excluding payroll)
- HR Development
- Employee Relations
- Labor Relations
- Separation Management

Customized Organizational Performance Improvement (KSA 3)
- Organization of people, procedures, and tools around business processes
- Organizational change management

Small Business Concerns Engagement Strategy

HCaTS provides significant opportunity for the use of small businesses and is committed to ensuring maximum practicable opportunity is provided to:

- Small
- HUBZone small
- Small Disadvantaged (includes Alaskan Native Corporations and Indian tribes)
- Women-owned
- Veteran-owned
- Service-disabled veteran-owned

Other Than Small business concerns shall provide Subcontracting Plans

- Demonstrate creative, innovative ways for involving small business concerns
- Incorporation into the awarded contract
- Describe previous small business strategies and how these successes will be expanded

Total Small Business Set-Aside with the HCaTS SB contract vehicle

- Do not have to compete directly against other than small business concerns
- Depending on dollar value, task orders shall be awarded under HCaTS SB contract vehicle

Screening and Evaluation

Identify Top 40

- All proposals will be ranked by their self-score.
- The Top 40 plus all ties for each Pool will be screened and evaluated.

Initial Screening

- The list of files that the Offeror states that they submitted will be compared to all files submitted on the Offeror's proposal.
- Omission of requirements will be identified.

Minimum Requirements Review and Score Validation

- The minimum requirements of the solicitation will be reviewed.
- All scoring elements will be validated and scores adjusted accordingly.

Resorting of the Top 40

- Proposals that do not meet a minimum requirement or have a score that is reduced below the Top 40 will be replaced by the next highest scoring proposal.
- Proposals that enter the Top 40 will be screened and evaluated.

Pricing for the Top 40 will be evaluated

Offeror Responsibility Evaluation

- Federal Awardee Performance and Integrity Information System (FAPIIS)
- Exclude Parties List System (EPLS)
- Offeror's Representations and Certifications
  - System for Award Management (SAM) records using the predominant NAICS codes
- Financial Capability
- Insurance

Six Relevant Experience Projects of your choosing
- Four of the projects
  - Shall correspond to one of the NAICS Codes aligned with the Pool
  - Be within scope of at least one KSA
- Two of the projects
  - Can be under ANY NAICS Code
  - Be within scope of at least one KSA

Relevant Project Experience – may be one of the following:
- Single contract
- Single task order placed under a master Single Award or Multiple Award, Indefinite Delivery task order contract
- Single task order placed under a Federal Supply Schedule
- Single task order or purchase order placed under a master Single Award or Multiple Award Blanket Purchase Agreement
- "Collection of task orders" placed under a master Single Award or Multiple Award, Indefinite Delivery task order contract or master Single Award or Multiple Award Blanket Purchase Agreement

*All NAICS and KSAs will be validated

Relevant Experience Project Minimum Requirements

- Be in scope of at least one KSA and some component of the KSA-related service and/or product was customized

- Have been performed within the past five years prior to the solicitation closing date; or, be ongoing. In addition, each Relevant Experience Project shall have at least three months of performance, including options

- Have a total estimated and/or obligated value no less than $25,000.00

- Have an average past performance rating of 3.00 or higher, provided that past performance information exists

- Have verifiable contractual documents to substantiate the Relevant Experience Project meets the minimum requirements

- Have been awarded by an entity outside of your corporate structure

- Not have been terminated for cause or default

How it Works

- Series of questions to be addressed by the Offeror
- Based on information provided, points are auto-populated on the Scoresheet
- Contracting Officer will make corrections to the score as they are identified during evaluation

Points for Relevant Experience Projects

- Past Performance
- Multiple KSAs
- Project Value
- Project Duration
- Federal Customers (Prime Contractor and First-Tier Subcontractors)
- Subcontracting/Teaming
- Meeting/exceeding Total Small Business Goals (Unrestricted only)
- Projects with Cost-Reimbursement

Points for Accreditations

- Not a minimum or mandatory requirement
- Offeror shall provide verifiable supporting documentation
- Accreditations include:
    - Acceptable Estimating System
    - Approved Purchasing System
    - Forward Pricing Rate Agreements (FPRA)/Forward Pricing Rate Recommendations (FPRR)/Approved Billing Rates
    - Earned Value Management System (EVMS)
    - ISO 9001:2008
    - ISO 27001:2005/27001:2013

Submitting a Proposal?

Do:

- Compete for more than one Pool, just submit everything in one proposal
- Ensure all support documentation is included, make sure you have two copies on two separate DVD+R disks and check your labeling!
- Use the Proposal Format Table - it saves time!!
- Double check your proposal with the Proposal Checklist before submitting

Do Not:

- Reformat the RFP
- Submit a paper copy of your proposal (it will not be accepted) - we are trying to save the trees
- Falsify, mislead or provide fraudulent information

Have a Question?

- Send it to: hcatsquestions@gsa.gov

YOUR ONE STOP SHOP FOR INFORMATION, UPDATES, COMMUNICATIONS, and more!!!

- Check the HCaTS Interact site often!!
  - https://interact.gsa.gov/hrfssi

- FedBizOpps
  - GS02Q15CRR0001 -HCaTS
  - GS02Q15CRR0002 -HCaTS SB

- Send your questions in writing to our email: hcatsquestions@gsa.gov

Questions

Closing Remarks

- Rich Vinnacombe, Branch Chief of TMA Outreach Branch - OPM
- Joseph Kennedy, Associate Director, Human Resource Solutions - OPM

Final Thoughts

- Katherine Archuleta, Director - OPM

Thank you for your participation!!

Due to the interest in HCaTS, we are hosting a Virtual Industry Meeting!

May 27th from 1:00 pm to 3:00 pm EDT.

Please register by Monday, May 25th by 5:00 pm on the HCaTS Interact Site:

https://interact.gsa.gov/gsa-event/virtual-human-capital-and-training-solutions-hcats-industry-day